

Attachment A

OFFICE OF THE CHIEF TECHNOLOGY OFFICER ERP PROJECT MANAGER – PEOPLESFT HCM HR MODULES

STATEMENT OF WORK

C.1 SCOPE:

The Government of the District of Columbia, the Office of the Chief Technology Officer (OCTO) is seeking an Enterprise Resource Planning (ERP) Project Manager (PM) to plan, direct and coordinate the implementation of the new Human Resource modules for the PeopleSoft HCM Information System. The current version being used is HCM v8.8, SP1 MP4.

C.1.1 DEFINITIONS

C.1.1.1 ERP – Enterprise Resource Planning software, which is software that spans the entire District of Columbia.

C.1.1.2 HCM – Human Capital Management, which is the name of the PeopleSoft Payroll and Human Resource system.

C.2 BACKGROUND

C.2.1 OCTO, in collaboration with the Office of the Chief Financial Officer (OCFO) and the District of Columbia Human Resources (DCHR) is embarking on an ambitious program to upgrade and implement PeopleSoft Human Capital Management (HCM) information systems to realize new efficiencies while simultaneously offering a broad range of new administrative services for the District. Currently, three core PeopleSoft HCM modules (HR, Benefit Administration and Time and Attendance) are deployed into operations and the deployment of the Payroll module is underway.

This citywide enterprise solution initiative will encompass, but not be limited to, business process engineering, system replacements, system enhancements, new systems selection, and custom enhancements of existing applications, system integration, and information technology oversight.

This effort will be accomplished through a series of inter-related information technology (IT) projects that will be managed, and/or coordinated within OCTO. OCTO will collaborate with the District agencies to assure that the technological solutions are responsive to the operational plans and priorities of client agencies and their partners within the District government, and with applicable community service providers.

C.3 REQUIREMENTS

The Contractor shall perform the following:

C.3.1 Plan, direct and coordinate the installation of the new Human Resource modules for the PeopleSoft HCM Information System within prescribed time frames and funding parameters, including Recruitment, Performance Management, Learning Management, Compensation Management, and Workforce Analytics.

C.3.2 Ensure that project goals are accomplished and in line with business objectives.

C.3.3 Manage the team that develops and carries out the project.

C.3.4 Monitor project activities and ensure the currency, quality, and integrity of the information, while providing consistency in content and "look and feel" across the enterprise.

C.3.5 Work closely with the assigned user community (and through business technologists) to determine how technology might assist in addressing its needs, and then translate these needs into system requirements and design specifications.

C.3.6 Understand how to leverage applications for competitive advantage.

C.3.7 Manage a dynamic team of individuals who constantly search for creative ways to elevate the capabilities of technology systems to meet business needs, partly by capitalizing on emerging technologies and partly by adapting technologies to the needs of the customer.

C.3.8 Review project proposals or plans to determine time frame, funding limitations, procedures for accomplishing projects, staffing requirements and allotment of available departmental resources to various project phases.

C.3.9 Establish work plan and staffing for each phase of projects, and arrange for recruitment or assignment of project personnel.

C.3.10 Confer with project staff to outline work plan.

C.3.11 Formulate and define technical scope and objectives of projects.

C.3.12 Identify and schedule project deliverables, milestones and required tasks.

C.3.13 Assign duties, responsibilities and scope of authority to project personnel.

C.3.14 Direct and coordinate activities of project personnel to ensure project progresses on schedule and within budget.

C.3.15 Review status reports prepared by project personnel, and modify schedules or plans as required.

C.3.16 Establish standards and procedures for project reporting and documentation.

C.3.17 Prepare project reports for management, clients or others.

C.3.18 Confer with project personnel to provide technical advice and to resolve problems.

C.3.19 Coordinate project activities with activities of business units.

C.3.20 Coordinate and respond to requests for changes from original specifications.

C.3.21 Identify project risk factors and develop risk mitigation strategy.

C.3.22 Develop quality assurance test plans.

C.3.23 Direct quality assurance testing.

C.3.24 Ensure easy access to information that is useful to users.

C.3.25 Keep close, direct contact with key end-user representatives to ensure technologies are providing valuable information-sharing capabilities to customers.

C.3.26 Manage internal and external systems/application development projects within assigned areas from inception to successful implementation:

C.3.26.1 Define project objectives, scope and level of effort;

C.3.26.2 Develop project strategies and plans, and identify the methods and tools required for the project;

C.3.26.3 Get projects off the ground, keep them on track and on budget, and resolve issues with customers; and

C.3.26.4 Monitor progress against plan.

C.3.27 Work closely with end users, business technologists and others to understand and prioritize business goals and information needs, and then develop system requirements and design specifications; direct efforts to refine conceptual systems design requirements into the technical design.

C.3.28 Provide leadership and motivation to project team members throughout the project life cycle.

C.3.29 Lead the effort in creative approaches to problem solving and quality deliverables supporting business needs.

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF THE CHIEF FINANCIAL OFFICER
OFFICE OF TAX AND REVENUE



TAX CERTIFICATION AFFIDAVIT

THIS AFFIDAVIT IS TO BE COMPLETED ONLY BY THOSE WHO ARE REGISTERED TO CONDUCT BUSINESS IN THE DISTRICT OF COLUMBIA.

Date: _____

Name of Organization/Entity: _____

Address: _____

Business Telephone No.: _____

Principal Officer:

Name: _____ Title: _____

Soc. Sec. No.: _____

Federal Identification No.: _____

Contract No.: _____

Unemployment Insurance Account No.: _____

I hereby certify that:

1. I have complied with the applicable tax filing and licensing requirements of the District of Columbia.
2. The following information is true and correct concerning tax compliance for the following taxes for the past five (5) years:

	Current	Not Current	Not Applicable
District: Sales and Use	()	()	()
Employer Withholding	()	()	()
Ball Park Fee	()	()	()
Corporation Franchise	()	()	()
Unincorporated Franchise	()	()	()
Personal Property	()	()	()
Real Property	()	()	()
Individual Income	()	()	()

The Office of Tax and Revenue is hereby authorized to verify the above information with the appropriate government authorities. The penalty for making false statements is a fine not to exceed \$5,000.00, imprisonment for not more than 180 days, or both, as prescribed by D.C. Official Code § 47-4106.

This affidavit must be notarized and becomes void if not submitted within 90 days of the date notarized.

Signature of Authorizing Agent

Title

Print Name

Notary: DISTRICT OF COLUMBIA, ss:

Subscribed and sworn before me this _____ day of _____ Month and Year

Notary Public: _____

My Commission Expires: _____

Attachment C Sample Resume'

Candidate 1

EDUCATION

MIDWAY SCHOOL OF BUSINESS - Chicago, IL
Master of Business Administration - Finance and Strategic Management - June 2001

- Dean's Honor List
- Active member of Management Consulting, Corporate Management and Strategy, and High Tech Clubs.

ANDERSEN COLLEGE - Boston, MA
Bachelor of Arts in Physics (Cum Laude) - June 1996

- Andersen College Scholarship for academic distinction; Dean's List all semesters
- Violinist in Andersen College Sym phony
- Physics tutor for Bureau of Study Counsel; active participant in Habitat for Humanity
- Completed dissertation in the field of condensed matter theory

EXPERIENCE

SMART BROTHERS - New York, NY
Technology Project Manager - Investment Banking - June 1997 - July 1999

- Managed project teams to develop profit and loss systems for Proprietary Trading group
- Promoted to project leadership role in two years, well ahead of department average of four
- Developed an original mathematical algorithm for trading processing module, improving performance by 1200%
- Led team of six analysts in firmwide project to reengineer loan syndicate trading flows in firm's largest technology project of 1999. Recommendations established new firmwide standard for real-time trade processing
- Appointed lead developer of interest accrual team after just three months in department. Initiated and designed project to create customized, improved interest accrual and P&L applications for fixed income controllers
- Selected to work on high-profile project to reengineer corporate bond trading P&L system. Reduced overnight processing time from six hours to 20 minutes and improved desktop application speed by 350%
- Devoted 20-25 hours a month to instructing junior members of the team in interest accrual and trading


FINANCIAL TECHNOLOGY GROUP - New York, NY
Analyst - June 1996 - May 1997

- Developed cutting-edge analytic software for use by Wall Street traders
- Worked on a daily basis with clients to create and implement customized strategic software solution for equity traders. Helped create and deliver extensive training program for clients
- Initiated, created, and documented new firmwide standard for software module development

References (Three): (Shall be provided to be considered.)



**Office of Contracting
& Procurement**

 Government of the
District of Columbia

SUMMARY EVALUATION OF CONTRACTOR/PROVIDER PAST PERFORMANCE

(Please Read The Attached instructions Prior To Completing This Form.)

CONTRACTOR/PROVIDER INFORMATION		MONITORING INFORMATION		1. CONTRACT NUMBER:					
2. Name of Contractor: Name: Address: City: State: Zip Code: Telephone: Facsimile: E-mail: Point of Contact:		3. Contract Administrator/COTR: Name: Address: City: State: Zip Code: Telephone: Facsimile: Agency: E-mail:		4. CLASSIFICATION <i>(Check boxes that apply)</i> <input type="checkbox"/> a. Small Purchase <input type="checkbox"/> b. Contract Action <input type="checkbox"/> c. DC Supply Schedule <input type="checkbox"/> d. Delivery Order <input type="checkbox"/> e. Fed. Supply Schedule <input type="checkbox"/> f. Intra-District <input type="checkbox"/> g. MOU <input type="checkbox"/> h. COOP Purchase <input type="checkbox"/> i. LSDBE <input type="checkbox"/> j. Subcontract					
6. CONTRACTOR TAX IDENTIFICATION NUMBER:		7. Contract Monitor: Name: Address: Telephone: Facsimile: Agency: E-mail:		5. DATE OF AWARD:					
9. CAPTION / DESCRIPTION:				8. COST ON DATE OF AWARD:					
				10. FINAL CONTRACT COST:					
11. CONTRACT PERIOD: <i>(Specify Month, Day, Year)</i> From _____ To _____				12. PERIOD OF PERFORMANCE EVALUATION REVIEW: <i>(Specify Month, Day, Year)</i> From _____ To _____					
13. Evaluate the Contractor's adherence to the specific contract requirements or Scope of Work.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
14. Evaluate the quality of the Contractor's delivered item or final work product, or service.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
15. Evaluate the timeliness and adherence to interim and final delivery requirements and milestones.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
16. Evaluate the reliability of the Contractor.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
17. Evaluate the effectiveness of the Contractor's service delivery and interaction.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
18. Evaluate the accuracy, timeliness, and completeness of contractor's documentation.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
19. Evaluate contractor's technical performance and approach to the contract.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
20. Evaluate the ability of contractor to deliver or perform at the original price or budget.				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
21. Evaluate the effectiveness of Project Management. (Check only if applicable.)				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Evaluate the Contractor's compliance with Safety Standards. (Check if Applicable) (Required for construction contracts.)				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
23. Evaluate the Contractor's compliance with Labor Standards. (Required for construction contracts.)				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
24. Evaluate Contractor's facility(ies) (Check only if applicable. Note each location, if more than one).				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
25. Provide an OVERALL PERFORMANCE EVALUATION RATING and add any additional comments. (Attach separate sheet if necessary.)				0. <input type="checkbox"/>	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
26. Evaluator ?									
a. Name:		b. Signature:		c. Date		d. Comments:			

27. Contracting Officer Review ?	a. Name:	b. Signature:	c. Date	d. Comments:
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DISTRIBUTION [FOR OCP USE ONLY]: <input type="checkbox"/> a. Procurement File <input type="checkbox"/> b. Agency Chief Contracting Officer <input type="checkbox"/> c. Chief Procurement Officer (CPO) <input type="checkbox"/> d. OCP Headquarters (Quality Assurance)		<input type="checkbox"/> e. Contract Administrator/COTR <input type="checkbox"/> f. Contract Monitor <input type="checkbox"/> g. Agency Director <input type="checkbox"/> h. Agency Program	<input type="checkbox"/> i. Agency Chief Financial Officer <input type="checkbox"/> j. D.C. Office of Inspector General <input type="checkbox"/> k. D.C. Office of Local Business Development <input type="checkbox"/> l. OTHER: _____
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Computer Generated

OCP Form 4001 (Front)

(Rev. 3/2000)

INSTRUCTIONS

GENERAL INSTRUCTIONS:

- This form shall be generated to rate the performance of any contractor, provider, or supplier of goods and services to the District of Columbia.
- The performance shall be summarized in the comments blocks included on the front of this form by checking the appropriate rating block, and adding any additional comments. If there is not enough space to provide additional comments, please provide the comments on a separate sheet and attach that sheet to the form..
- Please complete and transmit the attached form to your Agency Chief Contracting Officer in the Office of Contracting and Procurement (OCP), no less than three (3) weeks from the date that a contract ends; or the final delivery and receipt of goods and services pursuant to a contract; or upon the specific request of a representative of the Office of Contracting and Procurement.
- Please evaluate the performance of the contractor in each area requested checking the appropriate block on the performance evaluation form in accordance with the Rating Schedule listed below:

RATING SCHEDULE

- | | | |
|-----|-----------------------|---|
| (0) | UNSATISFACTORY | The performance was substandard, and does not meet most contractual requirements. The contractual performance contained serious compliance problems for which the contractor's corrective actions appear or were ineffective. |
| (1) | POOR | The performance was simply marginal, and just barely met the contractual requirements. There are, or were, deficiencies in the overall performance that the contractor needs to address. Generally, there were several concerns with the contractor's performance, quality and service. |
| (2) | SATISFACTORY | The performance acceptably meets or met the contractual requirements. The performance was timely, in compliance with the contractual requirements. Generally, there were a few minor difficulties or problems for which corrective action were undertaken by the contractor and were successful. |
| (3) | GOOD | The performance on this contract was more than satisfactory and exceeded some of the contractual requirements.
The performance was more than timely and the quality of service above compliance with the requirement. Generally, there was good satisfaction and happiness with the contractor performance, quality, and service. |
| (4) | VERY GOOD | The performance met and exceeded most of the contractual requirements, to the benefit of the government, resulting in a high standard of quality, timeliness, and overall customer satisfaction.. There were minimal difficulties with this contract for which all corrective actions undertaken by the contractor were met and fully implemented by the contractor. |
| (5) | OUTSTANDING | The performance of the contractor ALWAYS exceeds the contractual requirements, and was reflected by a continued pattern of an exceptional quality goods (or service, or work product); a continued pattern of advance delivery of goods or completion of services; a continued pattern of always performing at or below budget costs; and an unusual pattern of responsiveness to customer concerns; and an exceptionally high standard of demonstrated technical excellence. There were no contractor difficulties with this contract for which corrective action was required. |
- A written, detailed narrative **SHALL** be provided to support and sustain all ratings of **UNSATISFACTORY** or **OUTSTANDING**. Please attach additional sheets, if needed.

SPECIFIC INSTRUCTIONS: (All items MUST be completed):

- | | |
|-----------|--|
| Block 1. | Insert the assigned, official contract number of the contract. |
| Block 2. | Enter the name, address, telephone and facsimile numbers, and the name of the point of contact of the contractor. |
| Block 3. | Enter the name, address, and telephone, facsimile and e-mail numbers of the Contract Administrator (CA) / Contracting Officer Technical Representative (COTR). |
| Block 4. | Enter the appropriate classification information on the contract, or purchase order. Check all that apply. |
| Block 5. | Enter the contract date of award. |
| Block 6. | Enter the contractor's federal tax identification number that is listed in or on the contract document. |
| Block 7. | Enter a brief statement proving a caption or description of the nature of the contract. |
| Block 8. | Enter the name, address, and telephone and fax numbers of the Contract Monitor, or person completing this evaluation, if other than the CA/COTR. |
| Block 9. | Enter the initial, or agreed upon, price of the contract as listed in the contract or purchase order, <u>exclusive</u> of all modifications. |
| Block 10. | Enter the final cost of the contract, or what has been, or will be paid to the contractor, <u>inclusive</u> of all approved cost modifications. |
| Block 11. | Enter the actual stated contract period of the contract that is listed on the front of the contract document. |
| Block 12. | Enter the specific period for which the performance evaluation is being completed if the specific period is less the total period of the contract. |

- Block 13. This item is intended to determine whether the contractor met, or is meeting, the specific requirements outlines in the scope of work that is listed in the contract.
- Block 14. This item is intended to determine the quality of the contractor goods, service, or work performance.
- Block 15. This item is intended to obtain an indication of the timeliness of performance. Ask the question: Did the contractor deliver or perform on time?
- Block 16. This item is intended to assess whether the customer believes the contractor is reliable enough to be used again by the District.
- Block 17. This item is intended evaluate how well the contractor interacted with the District. Was the contractor responsive, flexible, cooperative, and professional.
- Block 18. This item is intended to assess the contractor's consistency in submitting the complete documents for payment, and other administrative documents
Including compliance on obtaining adequate liability insurance coverage where that requirement is applicable.
- Block 19. This item is intended to ascertain whether the vendor demonstrated originality and resourcefulness in handling issues addressed in a more traditional manner.
- Block 20. This item is intended to evaluate the contractor complied with the stated, or negotiated, contract cost.
- Block 21. This item addresses the extent, effectiveness, and overall management capability of the contractor. *(Primarily in service, consulting and construction contracts.)*
- Block 22. This item addresses the extent to which the contractor met compliance requirements for a safe work site. *(Primarily applicable in construction contracts).*
- Block 23. This item addresses the extent to which the contractor met compliance requirements for labor standards and laws.
- Block 24. This item is intended to evaluate whether the facilities that are provided by the contractor to the District met requirements, including whether the facilities were clean, and safe; and met all District housing and building code requirements, or had a Certificate of Occupancy, where applicable.
- Block 25. Provide an OVERALL PERFORMANCE RATING assessing on the contractor's performance. The rating must be consistent with the prior ratings.
- Block 26. The Evaluator completing this performance evaluation shall sign and enter the date of signature.
- Block 27. The Contracting Officer shall review, and shall sign and enter the date of signature.